



Trends Report
2016

The Presidential Elections on YouTube

Intro

The next U.S. president will ultimately be decided on November 8, but that outcome on election day is comprised of a series of moments that started months earlier. Increasingly these moments are happening on YouTube. Millions of hours of watch time have been analyzed to provide insights into when and why people turn to YouTube to learn about candidates and political issues.

1. The Political Landscape on YouTube

2. The Impact of Political Moments on YouTube Watch Time

3. Candidates' Video Footprint





Informational posters on a bulletin board:

- Các Quyền Của Cử Tri
- 選民權利
- Voter Bill of Rights
- 投票者の権利憲章
- 유권자 권리장전
- Ballot de rigej kandidate og borte

Decorative graphic: FEB 21st with a top hat and hearts.

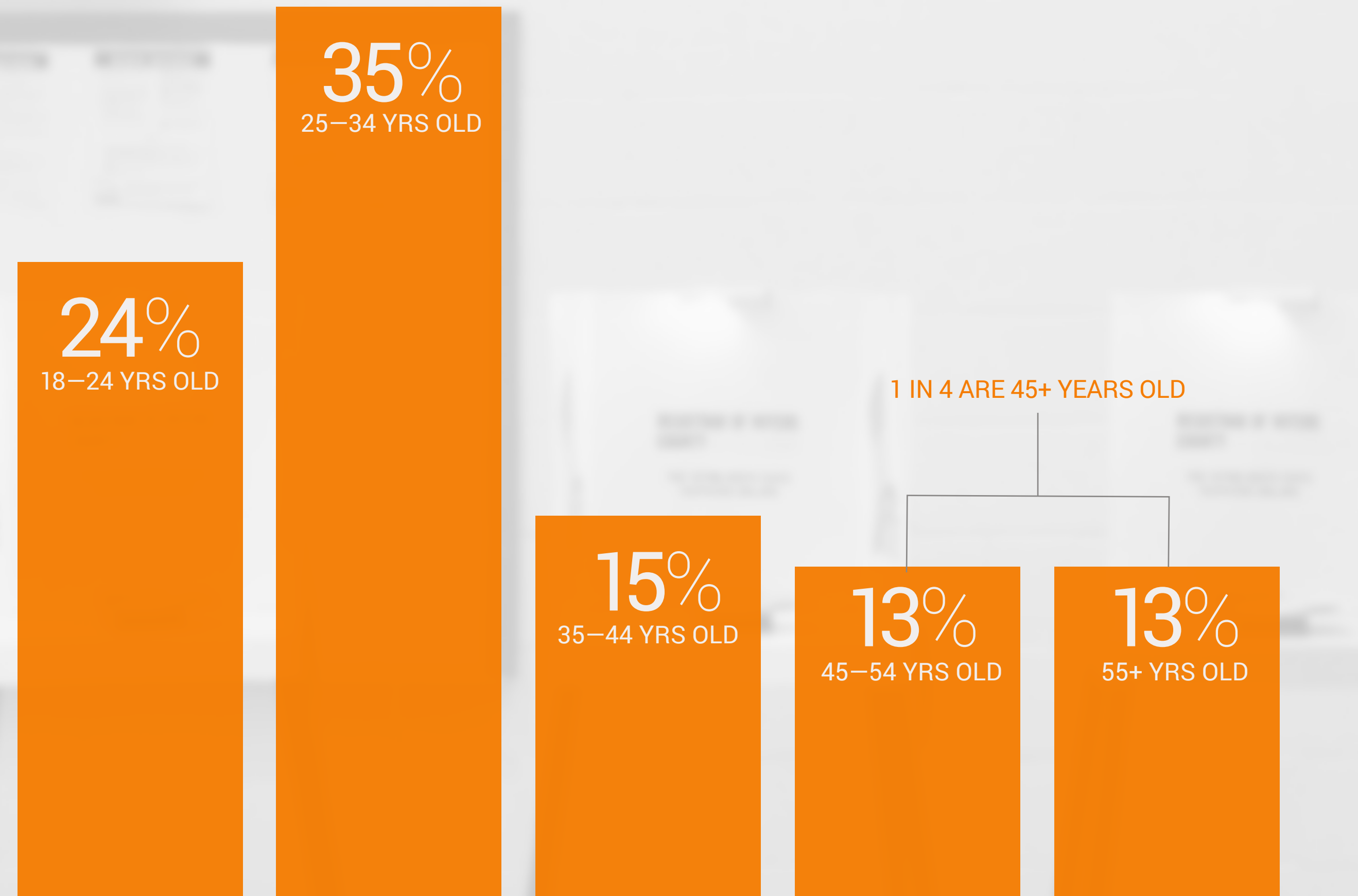
1. The Political Landscape on YouTube

REGISTRAR OF VOTERS COUNTY

THIS VOTING BOOTH SAVES TAXPAYERS DOLLARS

Online Video Consumption Across Ages

While 59% of people who turn to online video to learn more about the candidates are under the age of 35, we also see an older audience use online video as a resource. In fact, 1 in 4 are 45+ years old.



AGE BREAKDOWN OF LIKELY VOTERS WHO USE VIDEO TO LEARN ABOUT POLITICAL CANDIDATES OR ISSUES.

Source: Google/Ipsos Connect, Google Elections Omnibus, U.S., January 2016, n=2,022 U.S. Adults 18+.

Base: Likely voters who use online video n=282.

Candidates & Issues-Related Watch Time

Since candidate announcements started ramping up in April 2015, over 110 million hours of candidates and issues-related content has been watched on YouTube — that's estimated to be the equivalent of watching over 100 times every piece of content ever aired on CNN, C-SPAN, MSNBC and Fox News.

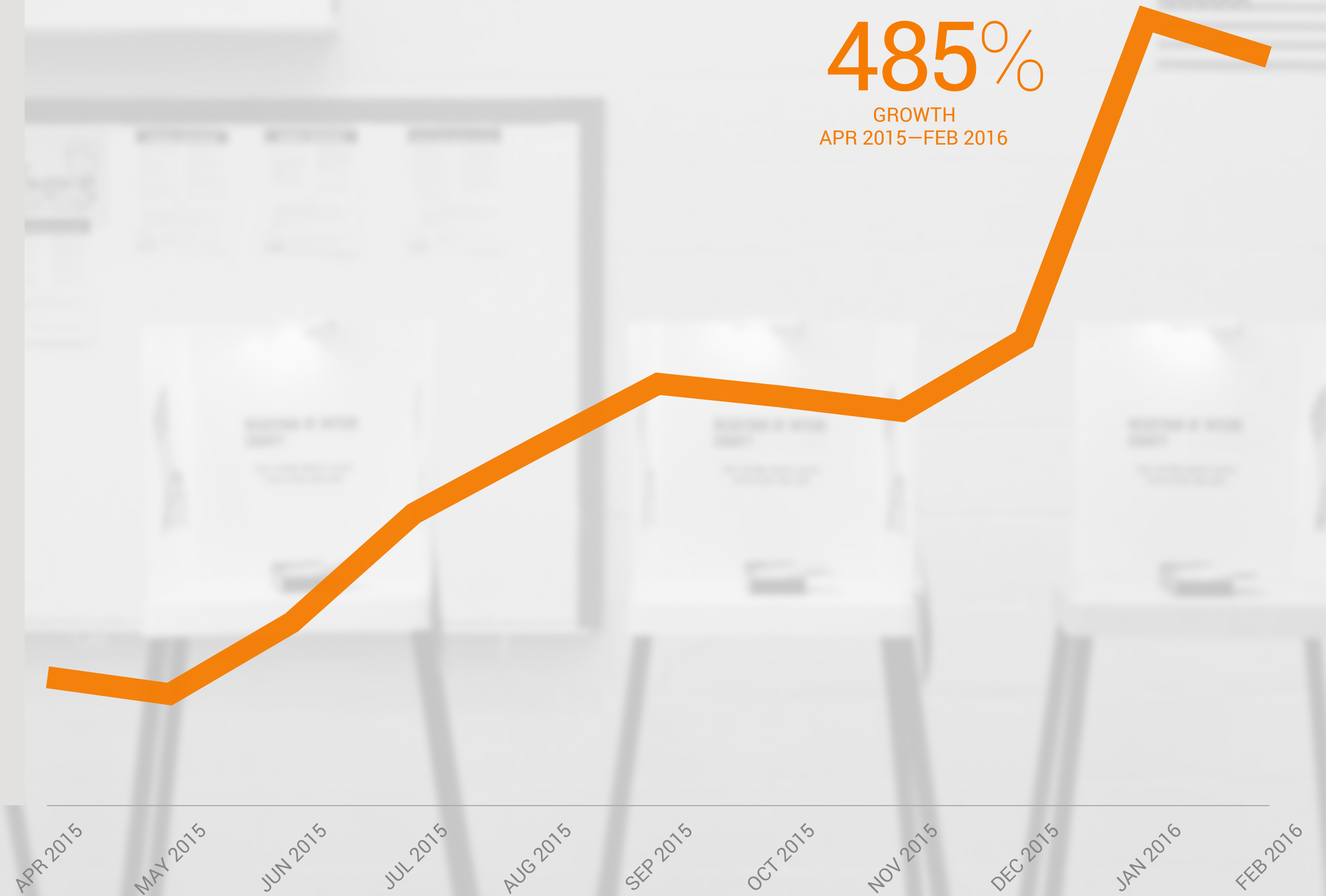


Source: Google data April 2015–February 2016, U.S., Classification as elections "candidates" and "issues" was based on public data such as headlines and tags, and may not account for every such video available on YouTube.

Content broadcast by CNN, C-SPAN, Fox News and MSNBC was estimated by adding the number of days since their first broadcast.

Candidates & Issues-Related Watch Time Growth

Since April 2015, candidates and issues-related video watch time has grown 485%.



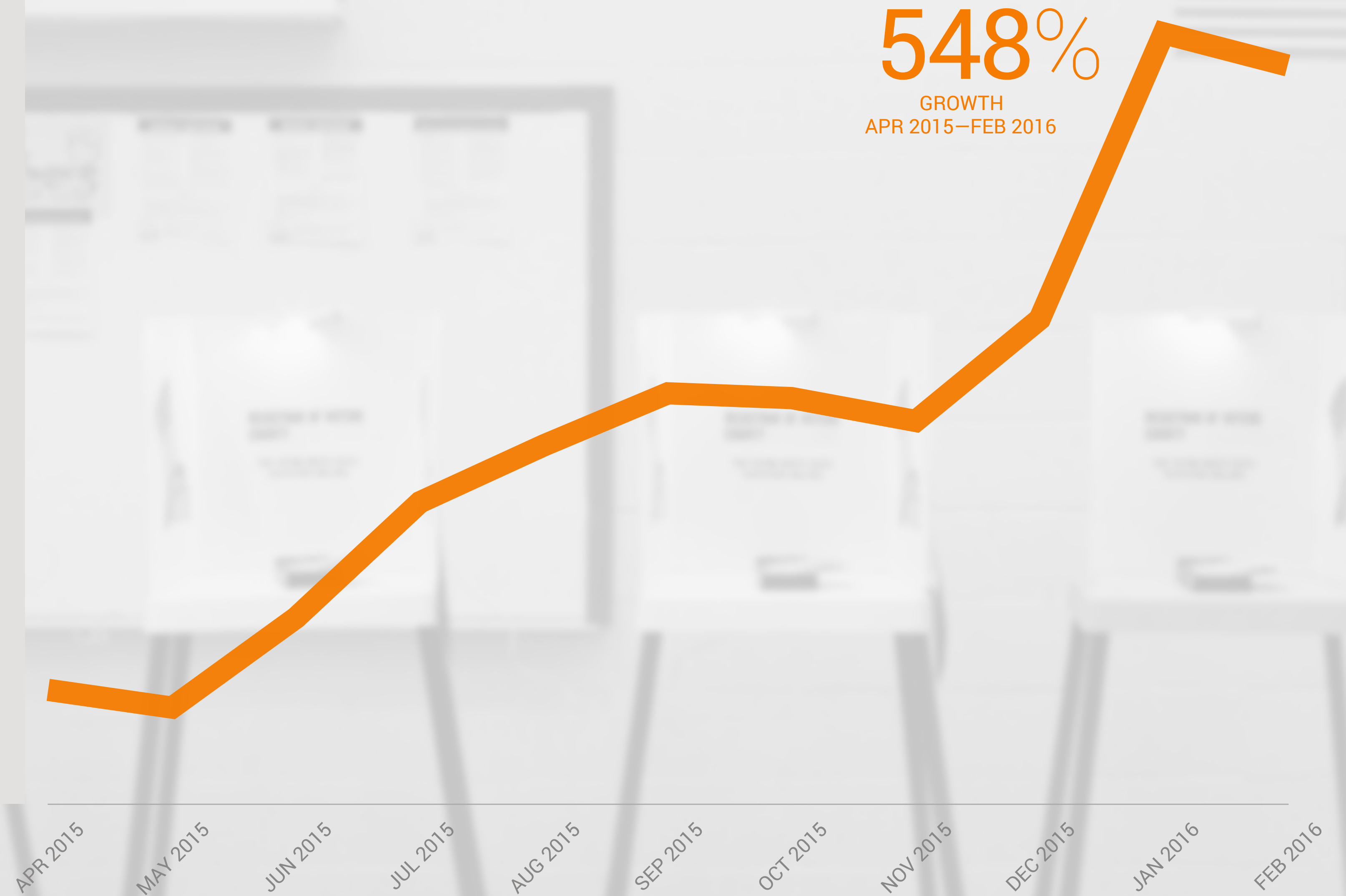
485%
GROWTH
APR 2015—FEB 2016

● CANDIDATES & ISSUES-RELATED WATCH TIME

Source: Google data April 2015–February 2016, U.S., Classification as elections "candidates" and "issues" was based on public data such as headlines and tags, and may not account for every such video available on YouTube.

Candidates & Issues-Related Watch Time: Mobile Breakout

Nearly 50% of candidates and issues-related watch time has come from mobile, representing a 548% growth during this time frame.



● CANDIDATES & ISSUES-RELATED MOBILE WATCH TIME

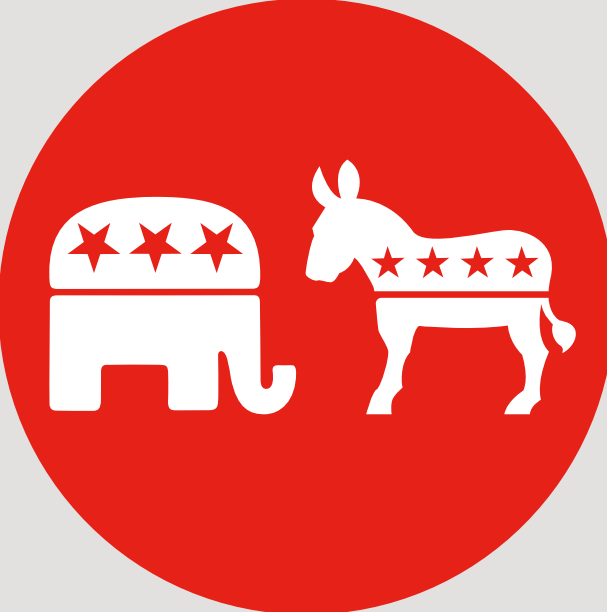
Source: Google data April 2015–February 2016, U.S., Classification as elections "candidates" and "issues" was based on public data such as headlines and tags, and may not account for every such video available on YouTube.



2. The Impact of Political Moments on YouTube Watch Time

Key political and cultural moments often shape watch time trends. There were significant increases in watch time surrounding key moments like the legalization of same-sex marriage, the Iowa caucuses and recent Democratic and Republican debates.

Political Issues

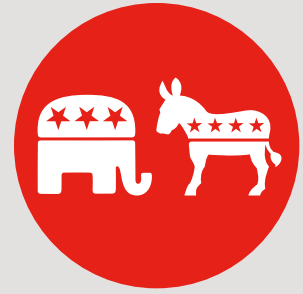


Primaries/Caucuses



Debates

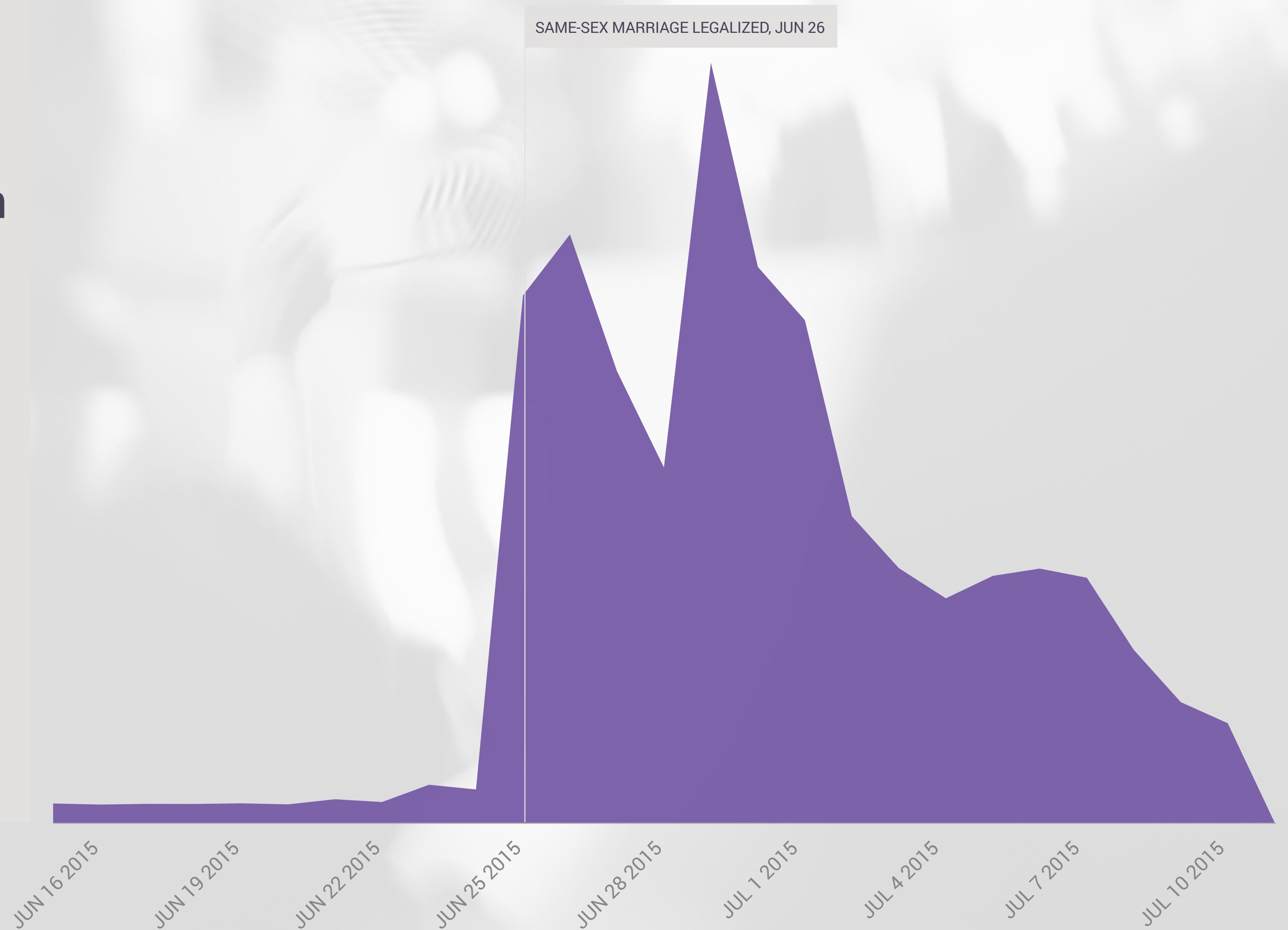




Political Issues

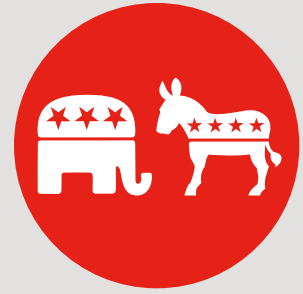
Same-Sex Marriage Legalization

The week after same-sex marriage was legalized (Friday, June 26 to Thursday, July 2), watch time for related videos was 24X the average of the three weeks prior. The first spike was driven mainly by videos discussing the ruling and the second by reaction videos, such as Fine Brothers' "Kids React to Gay Marriage Ruling."



● LEGALIZATION OF SAME SEX MARRIAGE

Source: Google data June 2015–July 2015, U.S., Classification as a candidates and issues-related "same-sex marriage" video was based on public data such as headlines and tags, and may not account for every such video available on YouTube.



Political Issues

Top Video Search Trends for Political Issues (based on search growth)

Issues-related YouTube searches have grown since the presidential candidates started announcing their runs for office. Some of the most-searched topics include: refugees, immigration, gun control, economy and health care. Among these topics, refugees has seen the largest growth since April 2015, 3X more than the next highest.

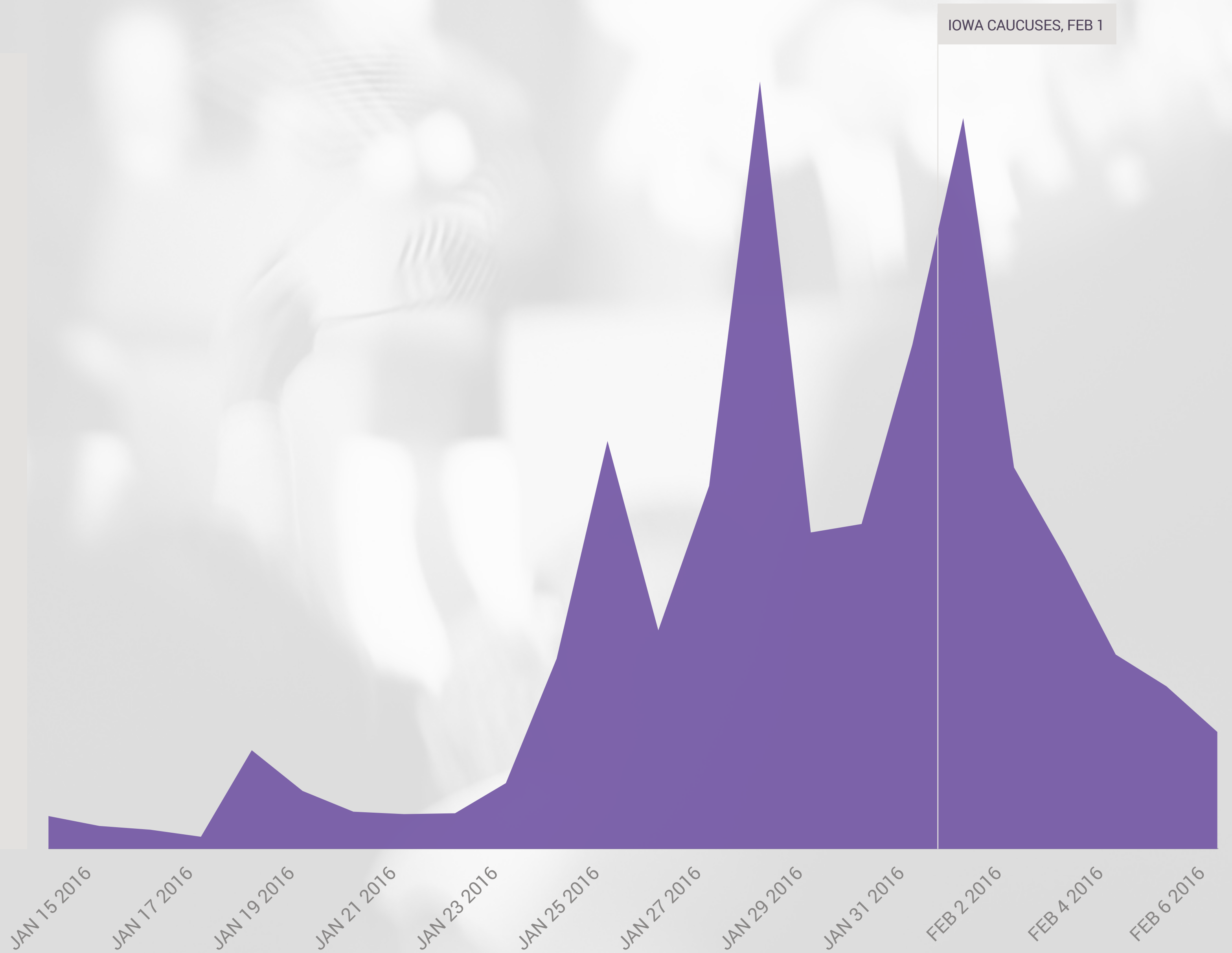
SINCE APRIL 2015	+224%	+51%	+27%	+22%	+10%
POLITICAL ISSUE	Refugees	Immigration	Gun Control	Economy	Health Care
SAMPLE SEARCHES	Refugee crisis Refugees in Europe Syrian refugees	Donald Trump immigration Immigration Immigration documentary	Gun ban Gun control 2015 Gun control debate	Economy 2016 Economy collapse U.S. economy	Health care reform John Green health care Obama health care



Primaries/Caucuses

The Iowa Caucuses

Looking at watch time the day before the Iowa caucuses and comparing it to the day after, there was a 125% increase in caucus-related watch time. Watch time spikes the week prior were driven by the CNN Democratic town hall on Jan 25 and the Fox Republican debate on Jan 28. Similar to the Iowa caucuses, there were also spikes in primary-related watch time the day after the New Hampshire primary (+365%) and Super Tuesday (+430%).



● IOWA CAUCUS

Source: Google data January 15–March 2 2016, U.S., Classification as a candidates and issues-related "Iowa Caucus" video was based on public data such as headlines and tags, and may not account for every such video available on YouTube.



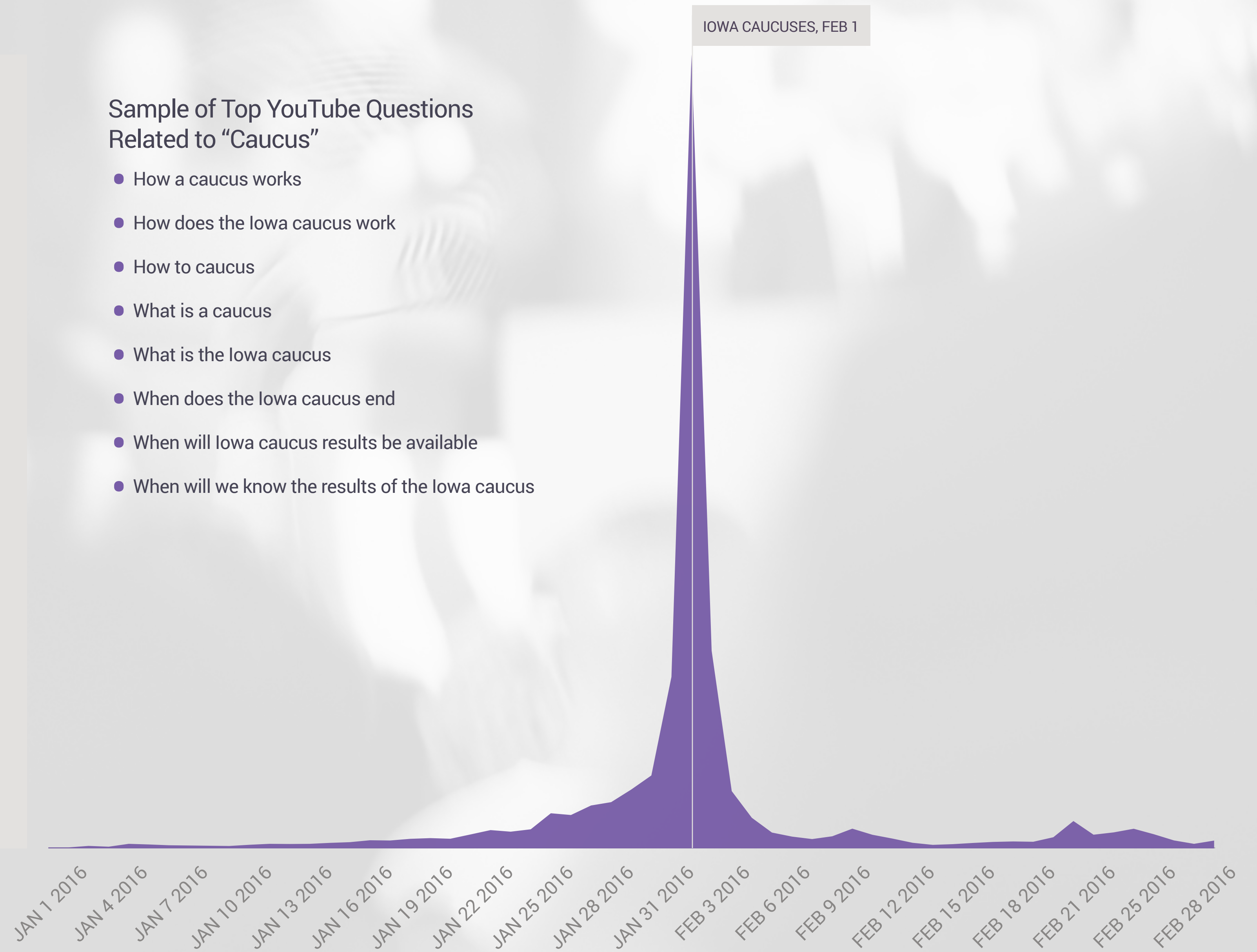
Primaries/Caucuses

The Iowa Caucuses

People also turned to YouTube to learn more about the caucuses. On February 1, there was a 363% spike in caucus-related questions on YouTube (compared to the day prior). Some candidates chose to answer with their own videos, e.g., Donald Trump's "Ivanka Trump—Find Your Iowa Caucus Location" and Bernie Sanders' "How to Caucus in Iowa."

Sample of Top YouTube Questions Related to "Caucus"

- How a caucus works
- How does the Iowa caucus work
- How to caucus
- What is a caucus
- What is the Iowa caucus
- When does the Iowa caucus end
- When will Iowa caucus results be available
- When will we know the results of the Iowa caucus



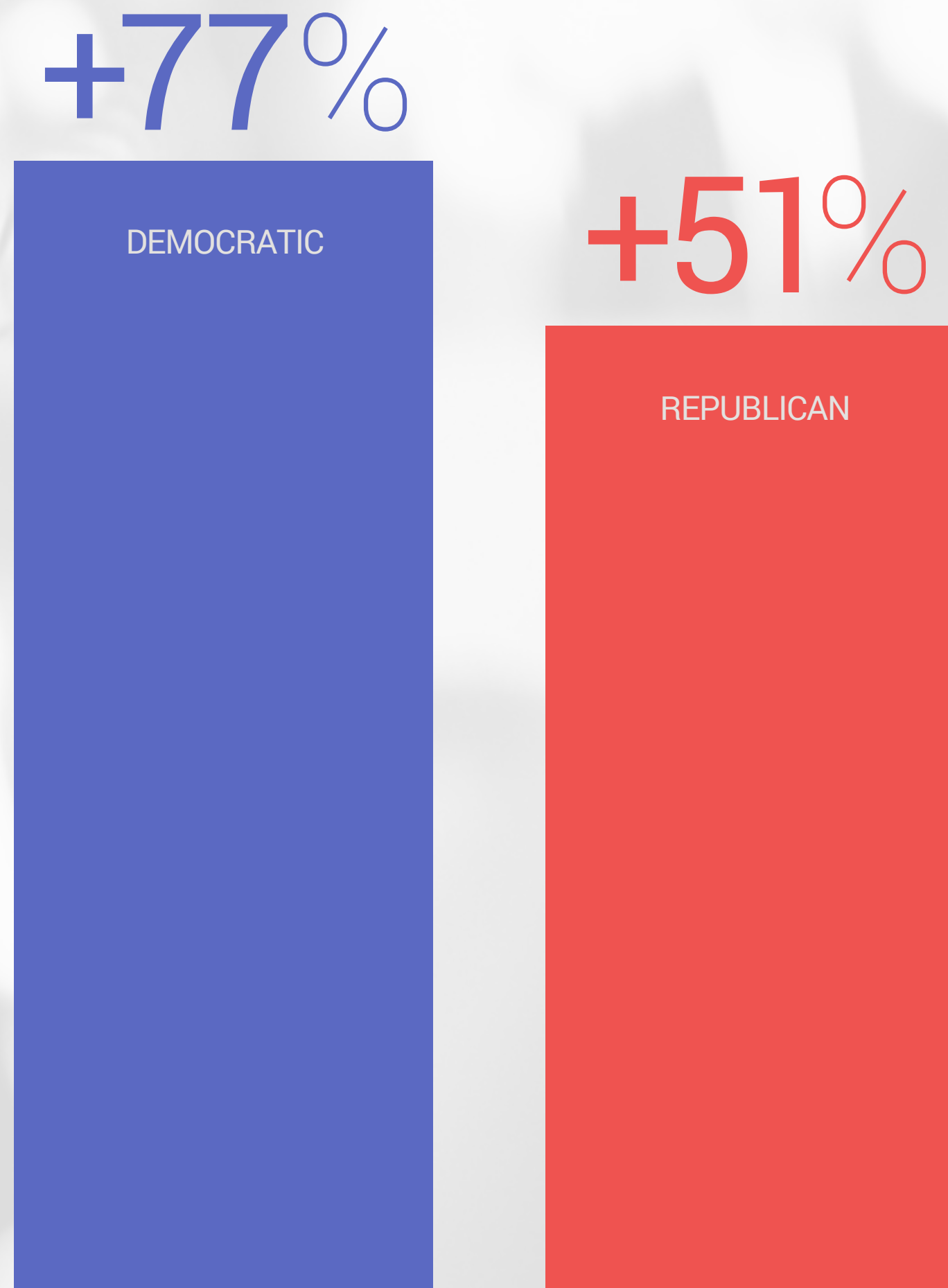
● SEARCHES FOR QUESTIONS ABOUT "CAUCUS"



Debates

Democratic & Republican Debates

Looking at watch time the day before recent Democratic and Republican debates and comparing it to the day after, there was an average 59% increase in candidates-related video watch time.



AVERAGE WATCH TIME GROWTH THE DAY AFTER DEBATES

● DEMOCRATIC DEBATES: DEC 19, FEB 4, FEB 11

● REPUBLICAN DEBATES: DEC 15, FEB 6, FEB 25

Source: Google data December 2015–February 2016, U.S., Classification as a candidate-related video was based on public data such as headlines and tags, and may not account for every such video available on YouTube.

A group of young people are gathered in a dimly lit room, possibly a social event or a meeting. In the foreground, a woman with long dark hair is looking down at her smartphone. Behind her, other people are visible, some looking towards the camera and others looking away. The background is blurred, showing some lights and a large screen or display.

3. Candidates' Video Footprint

Top Candidates-Related Issues on YouTube (ranked by watch time)

One reason people come to YouTube is to learn more about candidates' perspectives on key issues facing the U.S. In February, immigration was the only top topic consistently watched across all candidates.

Hillary Clinton on ...

- 1 Immigration
- 2 Same-sex marriage
- 3 Gun control

Marco Rubio on ...

- 1 Immigration
- 2 Taxes
- 3 Same-sex marriage

Ted Cruz on ...

- 1 Immigration
- 2 Same-sex marriage
- 3 Climate change

Bernie Sanders on ...

- 1 Immigration
- 2 Economy
- 3 Taxes

John Kasich on ...

- 1 Gun control
- 2 Same-sex marriage
- 3 Immigration

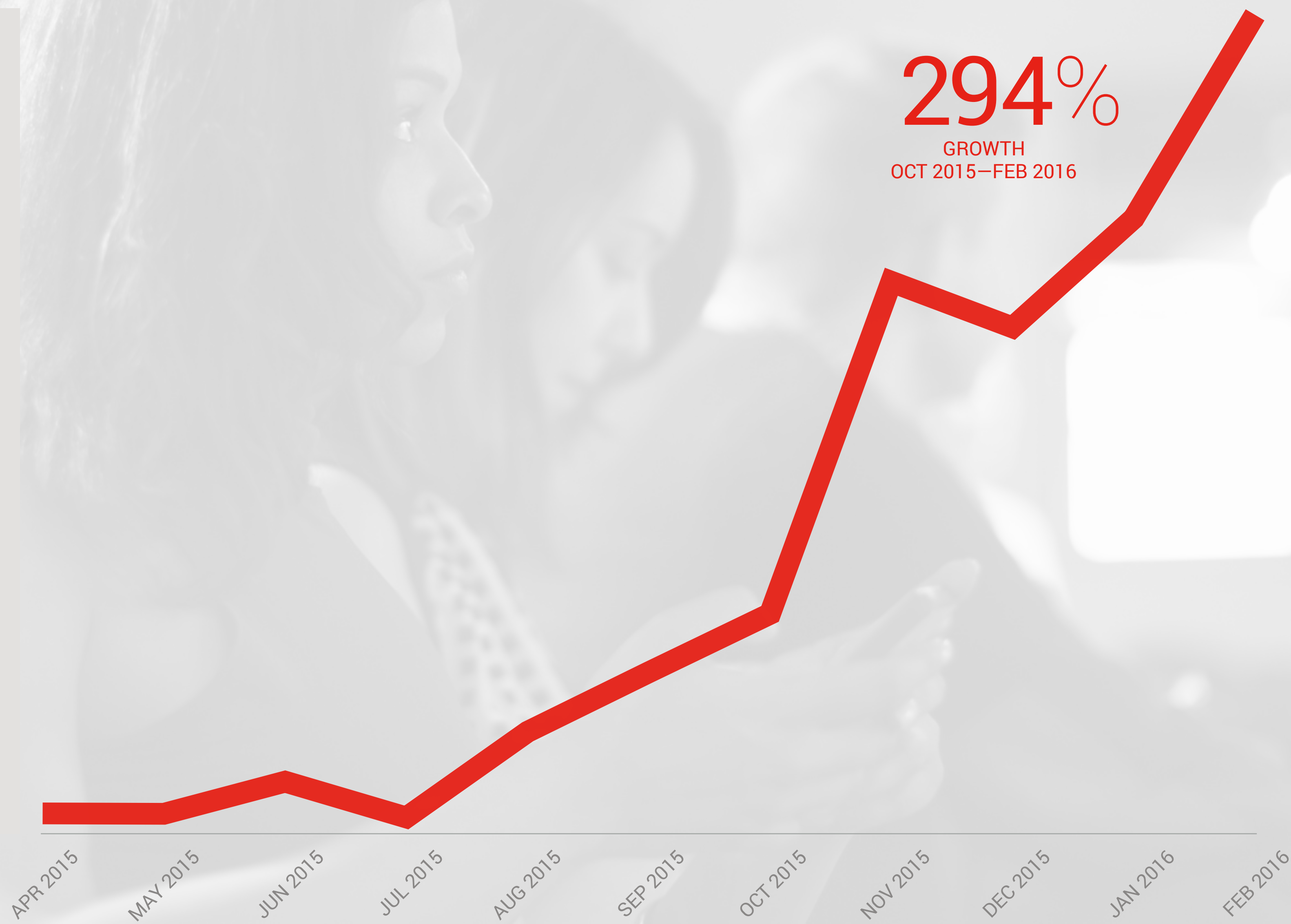
Donald Trump on ...

- 1 Immigration
- 2 Taxes
- 3 Economy

YouTube Political Ad Investment

Candidates ramped up spending on YouTube heading into the primaries. Since October, there's been a 294% increase in paid views, accounting for 77% of total paid views to date.

● PAID CANDIDATE CHANNEL VIEWS



Source: Google data April 2015–February 2016, U.S., Classification as a candidate-related video was based on public data such as headlines and tags, and may not account for every such video available on YouTube.

Reserve Ad Inventory in Key Primary & Caucus States

Paralleling a tough race and tight competition in key primary and caucus states, YouTube essentially sold out of reserve ad inventory ahead of the Iowa caucuses, New Hampshire primary, South Carolina primary and Nevada caucuses. This was a first for Iowa and New Hampshire.

